

The Ship Is Sailing: The Offshore Wind Opportunity



CLEAN ENERGY NH

Your Voice in All Energy Matters

US state offshore wind targets, pipeline maturity and forecast

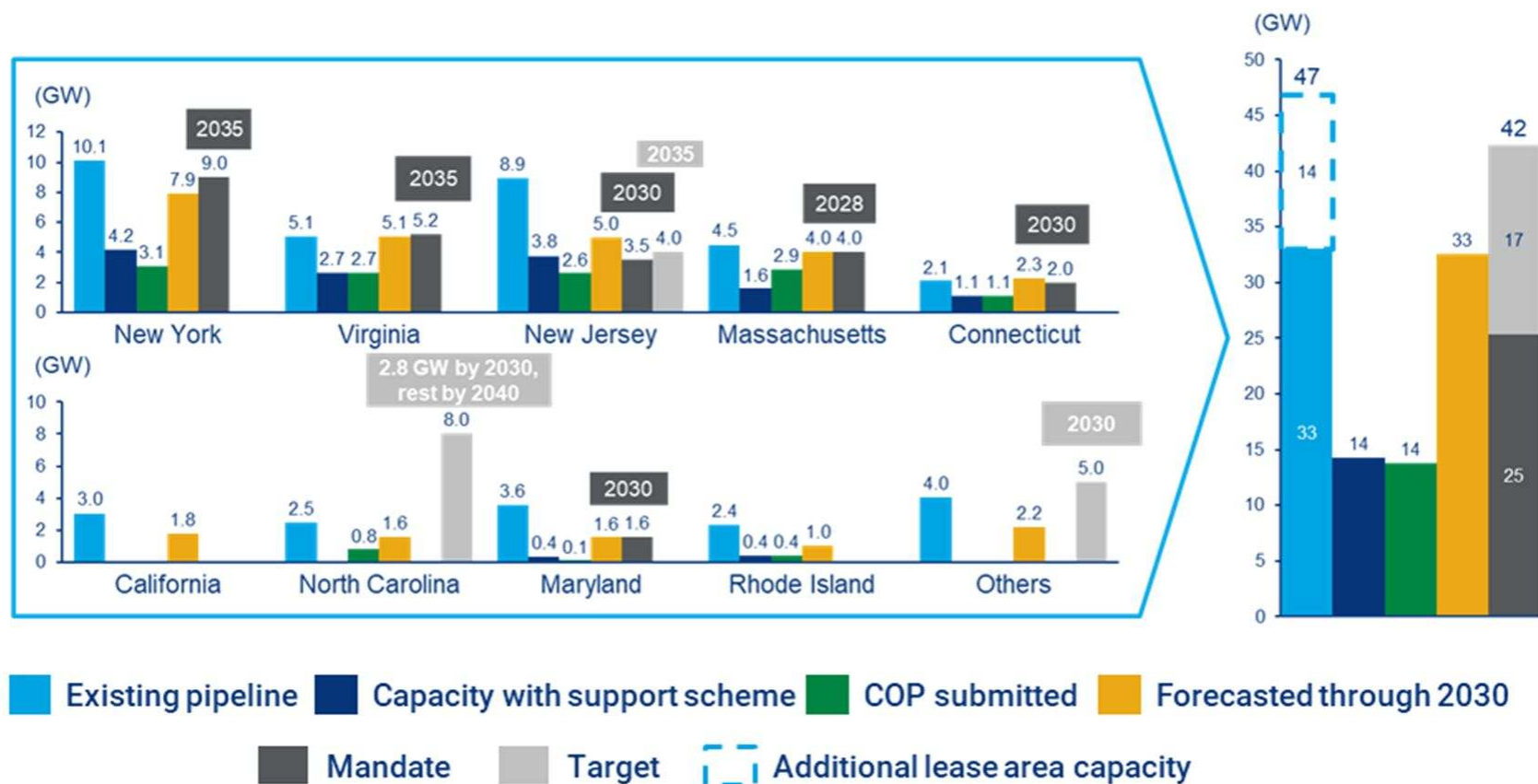
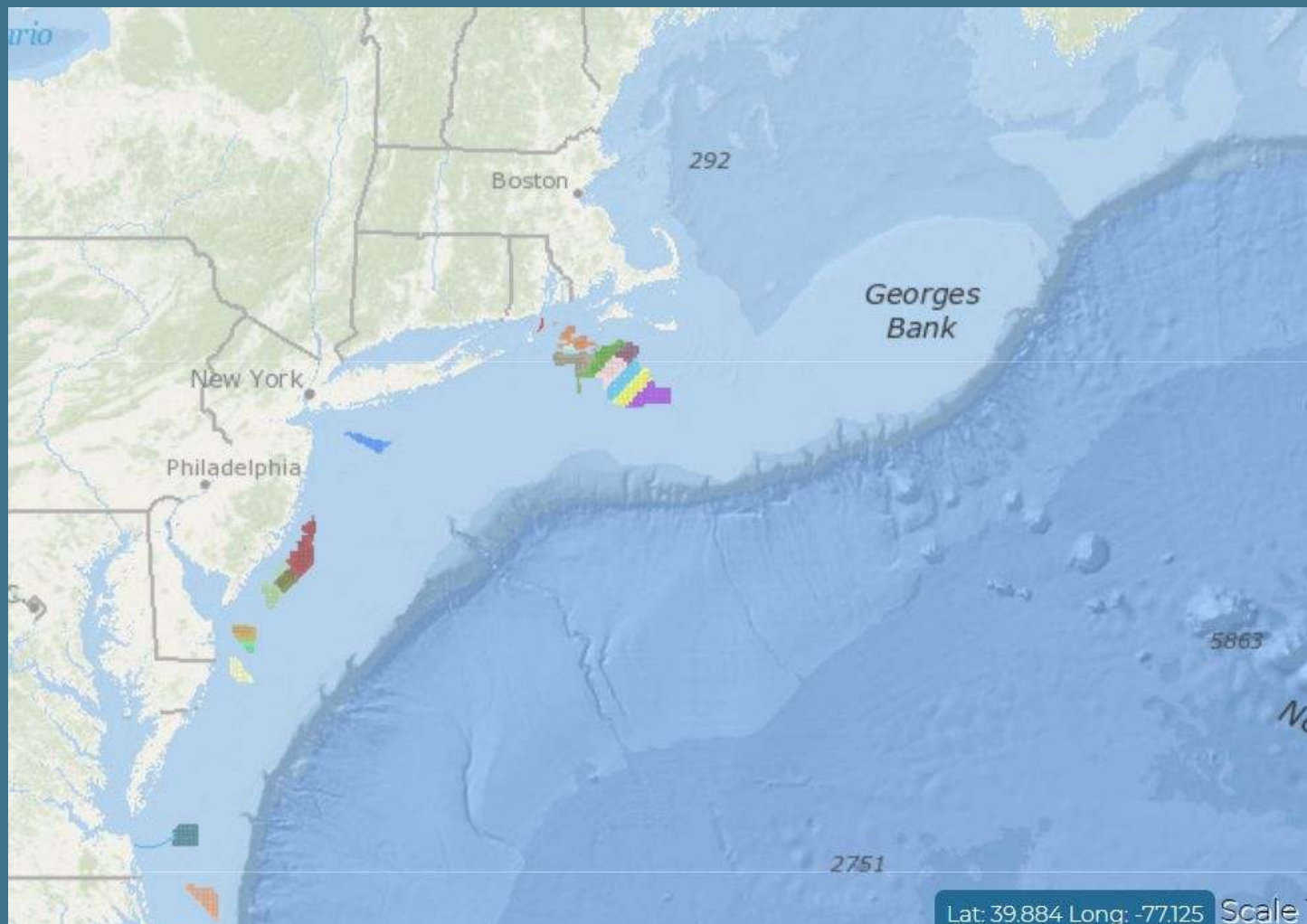


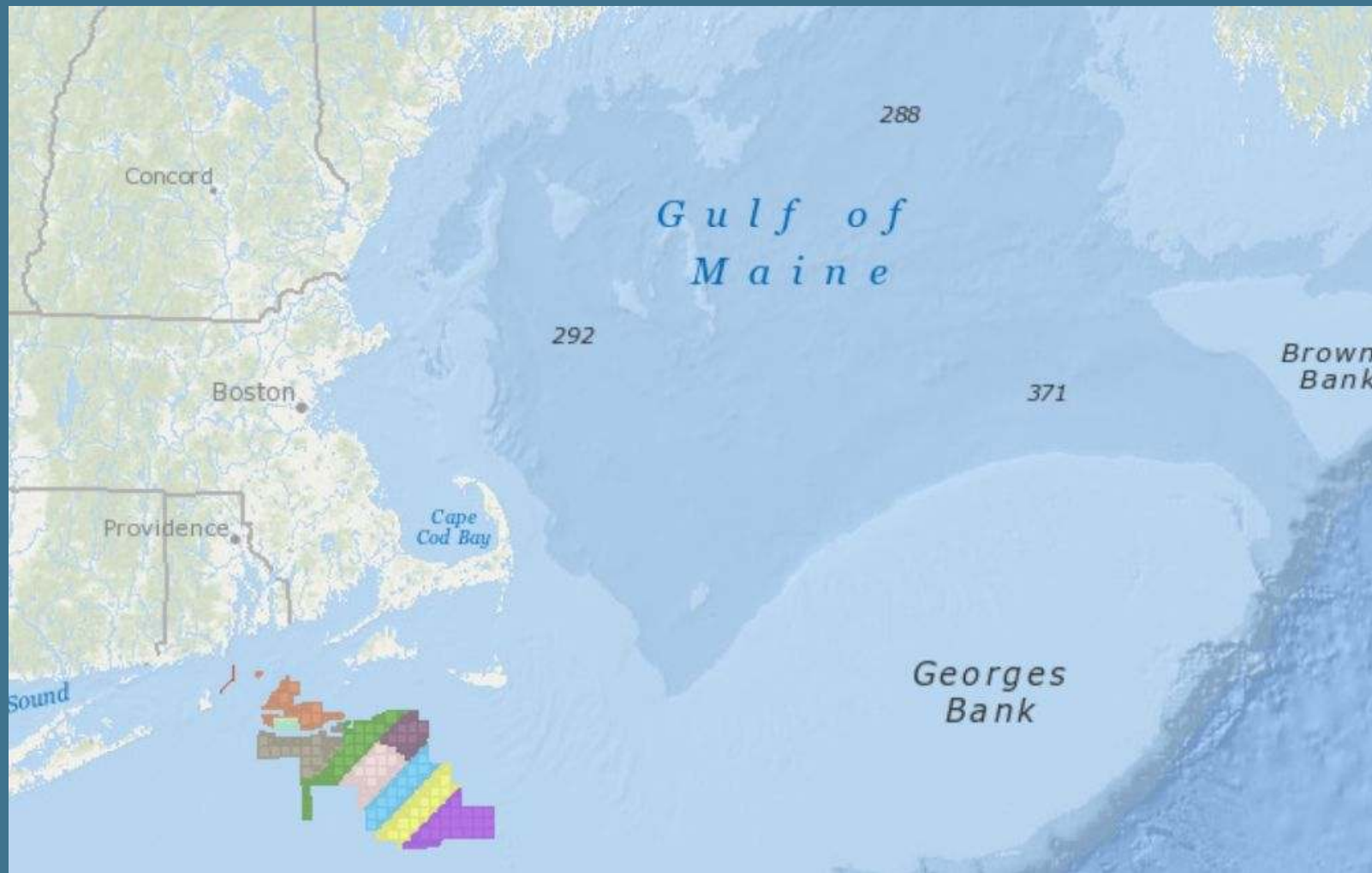
Table 6: Offshore Wind Economic Impact Summary for High Scenario

	2025		2035	
	Output	Value Add	Output	Value Add
Project Development and Construction, \$millions				
Project Development and Onsite Activity	\$966	\$807	\$1,311	\$1,140
Turbine and Supply Chain	\$6,288	\$2,614	\$10,246	\$4,191
Induced	\$2,583	\$1,412	\$4,035	\$2,215
Total	\$9,837	\$4,833	\$15,592	\$7,546
Operations and Maintenance, \$millions				
Onsite Activity	\$205	\$205	\$812	\$812
Supply Chain	\$1,641	\$737	\$6,002	\$2,692
Induced	\$797	\$382	\$2,947	\$1,415
Total	\$2,643	\$1,324	\$9,761	\$4,919
Total Annual Economic impacts, \$millions				
Project Development and Onsite Activity	\$1,171	\$1,012	\$2,123	\$1,951
Turbine and Supply Chain	\$7,929	\$3,350	\$16,248	\$6,882
Induced	\$3,380	\$1,794	\$6,982	\$3,631
Total	\$12,480	\$6,156	\$25,353	\$12,464

If New Hampshire wants to capitalize on the coming offshore wind Boom, it is moving too slowly on:

- **Port Development**
- **Lease Area Development**
- **Power Purchase Solicitations**





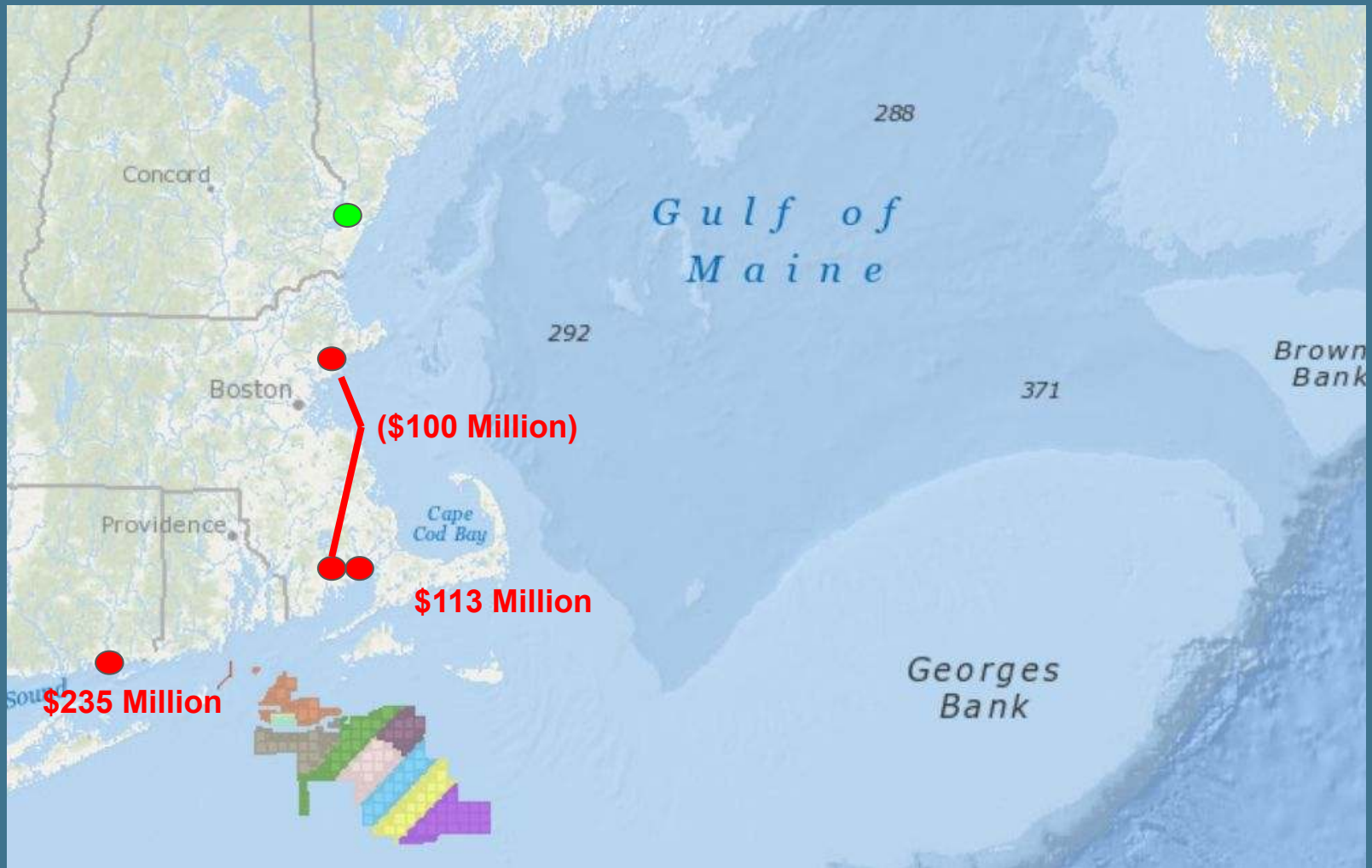


Table 1: Announced Domestic Infrastructure Investments to Support Offshore Wind Industry

Investment Type	Amount	Company(s)	Location	Year Announced
Manufacturing: Steel	\$76,000,000	US Wind & Ørsted	Maryland	2017
Manufacturing: Foundations	Not specified	Ørsted & EEW	Paulsboro, New Jersey	2019
Manufacturing: Foundations	Not specified	Equinor	Port of Coeymans, New York	2019
Manufacturing: Towers & Foundations	Not specified	Marmen & Welcon	Northeast US	2019
Manufacturing: Blades	\$200,000,000	Siemens Gamesa	Virginia	2020
Manufacturing: Cables	\$4,000,000	Marmon Utility	Seymour, Connecticut	2019
Manufacturing: Cables	Not specified	Nexans	Not specified	2019
Ports; Transmission infrastructure	\$650,000,000	Anbaric	Brayton Point, Somerset, Massachusetts	2019
Ports	\$157,000,000	Ørsted & Eversource, CT Port Authority	New London, Connecticut	2020
Ports	Not specified	Vineyard Wind	Bridgeport, Connecticut	2019
Ports	\$13,200,000	Ørsted	Tradepoint Atlantic, Maryland	2019
Ports	\$26,400,000	US Wind	Tradepoint Atlantic, Maryland	2017
Ports	\$50,000	Vineyard Wind	New Bedford, Massachusetts	2019
Ports	Not specified	Ørsted	Atlantic City, New Jersey	2019
Ports	\$60,000,000	Equinor	New York (Multiple Ports)	2019
Ports	\$10,000,000	Ørsted & Eversource	New York (Multiple Ports)	2019
Ports	Not specified	Ørsted & Eversource	Port Jefferson, New York	2019
Ports	\$40,000,000	Ørsted & Eversource	Port of Providence and North Kingston, Rhode Island	2018

Supply chain	\$15,000,000	Ørsted	New Jersey	2019
Supply chain	\$1,500,000	Ørsted & Eversource	Rhode Island	2019
Supply chain	\$10,000,000	Vineyard Wind	Massachusetts	2019
Turbine testing facility	\$35,000,000	MHI Vestas	Clemson University, South Carolina	2019
Vessel construction: Crew transfer vessel	Not specified	Ørsted & WindServe Marine	North Kingstown, Rhode Island	2019
Vessel construction: Crew transfer vessel	Not specified	Ørsted & WindServe Marine	North Kingstown, Rhode Island	2019
Vessel construction: Crew transfer vessel	Not specified	Atlantic Wind Transfers & Blount Boats	Warren, Rhode Island	2019
Vessel construction: Crew transfer vessel	Not specified	Atlantic Wind Transfers & Blount Boats	Warren, Rhode Island	2019

*Announcements as of February 20, 2020. This list may not capture all announcements.

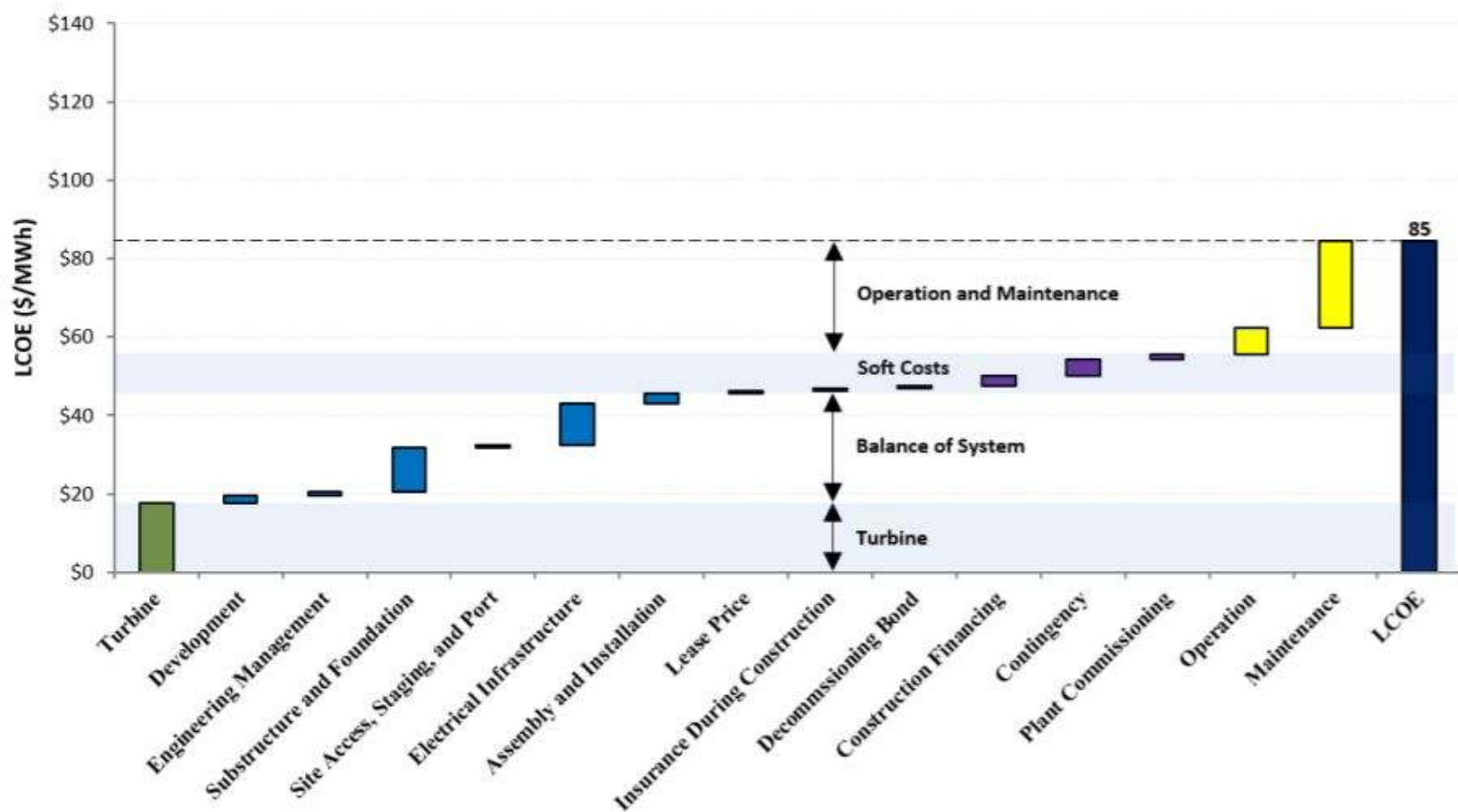


Figure 11. Component-level cost breakdown for the 2019 fixed-bottom offshore wind reference project

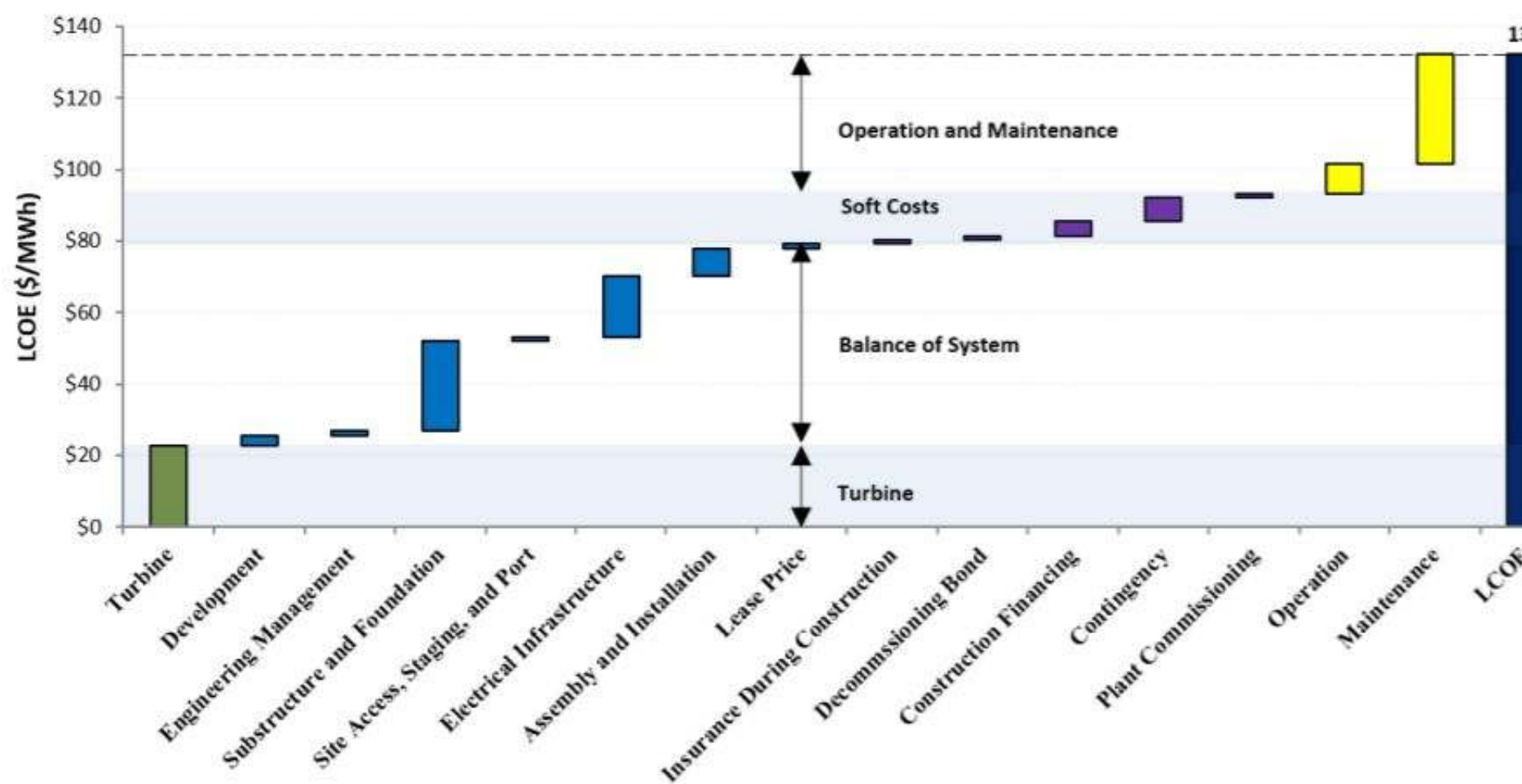
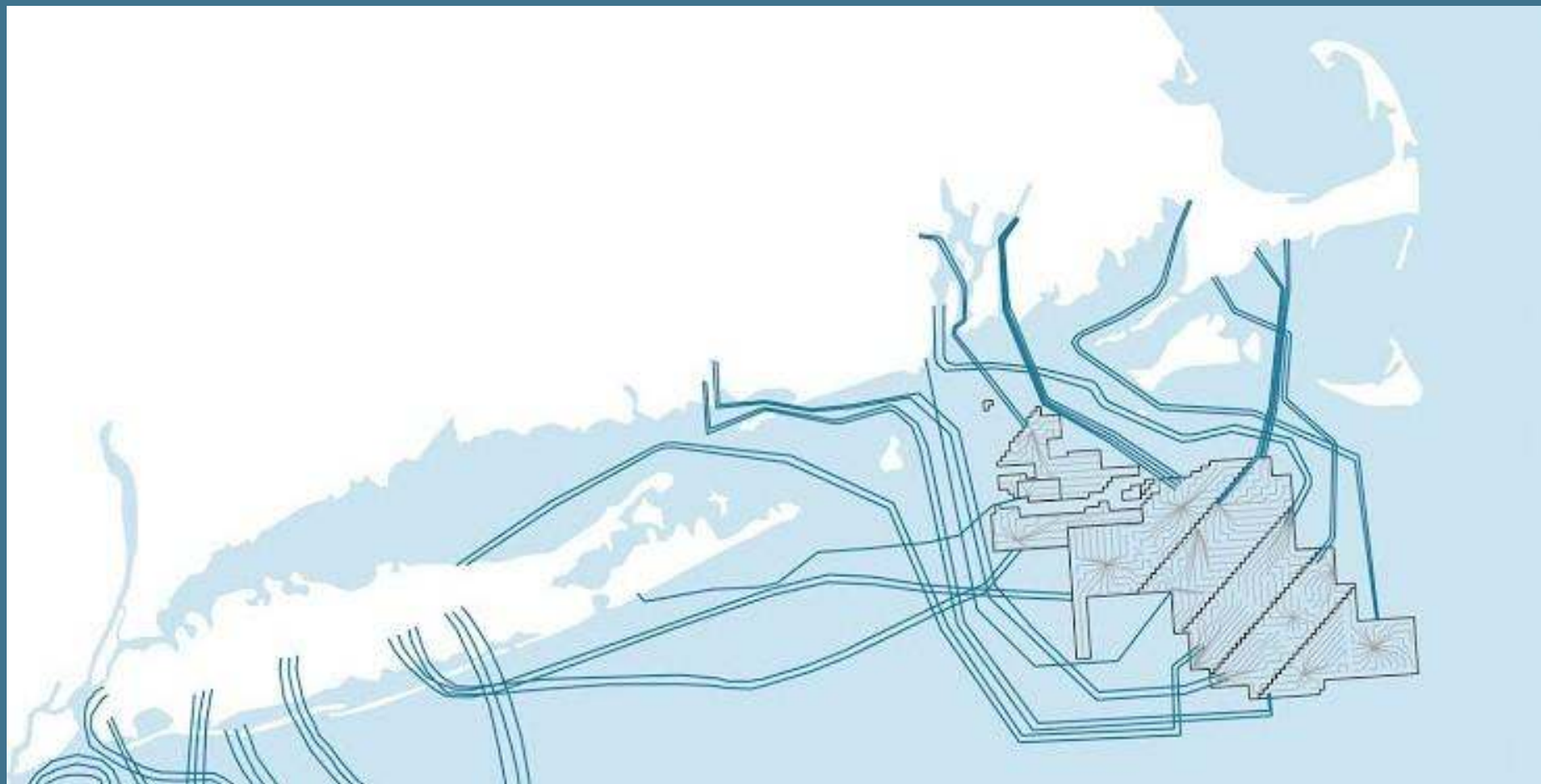


Figure 13. Component-level cost breakdown for the 2019 floating offshore wind reference project





Gulf of Mexico OCS Region
Call for Information and Nominations
2021 Renewable Energy Program

60 m Bathymetric
 1000 m Bathymetric
 1300 m Bathymetric

Call Area
 Congressional Moratorium /
 Presidential Memorandum
 GOMESA; sec104(a), PL 109-432
 /PM, dated September 8, 2020

Flower Garden Banks NMS

OCS Blocks
 OCS Planning Areas
 OCS Protractions

TEXAS

LOUISIANA

Western Planning Area

Central Planning Area

Map showing the Gulf of Mexico OCS Region, including Texas and Louisiana. The map displays various planning areas, bathymetric contours (60 m, 1000 m, 1300 m), and OCS blocks. Key features include the Flower Garden Banks National Marine Sanctuary, the Call Area, and the Congressional Moratorium / Presidential Memorandum GOMESA; sec104(a), PL 109-432 /PM, dated September 8, 2020. The map is divided into Western and Central Planning Areas.

Central Planning Area

Unless things change:

- **Manufacturing investments will flow to other ports**
- **First-mover states will consume the lowest cost offshore wind PPAs**
- **Floating turbine technology innovations will be developed in other regions**